

# EMPLOYEE APPLICATION FOR REIMBURSEMENT OF EXPENSES INCURRED UPON SALE OR PURCHASE (OR BOTH) OF RESIDENCE UPON CHANGE OF OFFICIAL STATION

(See Privacy Act Notice On Reverse)

## A. EMPLOYEE

1. Obtain a copy of all supporting documents needed to file your claim. Include sales agreements between buyer and seller, settlement or loan closing statements, invoices and statements that support other items claimed for reimbursement, etc. Do not send your original supporting documents as they cannot be returned to you. Send photo copies only.
2. Prepare the front and back of this application in triplicate. Sign and date the appropriate employee certification(s).
3. Prepare Form AD-616R, Travel Voucher (Relocation).
4. Submit the original and first copy of Form AD-424, all supporting documents, and the AD-616R, to the head of your office at new official station or to the appropriate official designated by your Department or agency. Retain the remaining copy of the AD-424 and supporting documents for your records.

old official station as provided in Chapter 2, Part 6, of the Federal Travel Regulation (FTR). The approving official, or his/her designee, will handle and execute the approval and return the package to you (see Section D).

2. **For Purchases.** Approval of this claim must be executed by the head of the office, or his/her designee, at the new official station (unless agency review and approval functions are performed elsewhere) (see Section D).
3. **Final Administrative Approval.** Payment of the claim must be executed by an appropriate approving official (see Section E). Such official shall independently determine, in accordance with the provisions of the FTR, the propriety of all reimbursements claimed. In this connection, all vouchers for reimbursement of real estate incident to the same transfer shall be examined. Submit the approved AD-616R with attached original AD-424, and supporting documents, to the USDA, National Finance Center, P.O. Box 60,000, New Orleans, LA 70160. File the copy of the application with the office copy of the voucher.

## B. HEAD OF OFFICE

1. **For Sales.** Submit the original and first copy of Form AD-424, all supporting documents, and the AD-616R, to the head of the office at the claimant's

SECTION A - EMPLOYEE			
1. SOCIAL SECURITY NUMBER	2. NAME (Last, first, middle initial)	3. RELOCATION SERVICE PREVIOUSLY AUTHORIZED FOR THIS TRANSFER <input type="checkbox"/> YES <input type="checkbox"/> NO	4. HAS EARLIER CLAIM FOR REAL ESTATE EXPENSES BEEN SUBMITTED FOR THIS TRANSFER? <input type="checkbox"/> YES <input type="checkbox"/> NO
5. MAILING ADDRESS (Street or P.O. Box, City, State, and Zip Code)			

SECTION B - TRANSFER DATA		
6. OLD OFFICIAL STATION	7. NEW OFFICIAL STATION	8. DATE OF NOTIFICATION OF IMPENDING TRANSFER
9. TRAVEL AUTHORIZATION NUMBER/DATE	10. DATE REPORTED FOR DUTY AT NEW OFFICIAL STATION	11. DATE SERVICE AGREEMENT SIGNED

SECTION C - RESIDENCE PROPERTY DATA				
Complete Address of Residence	<b>12. SALE</b> (Old Official Station)	<b>13. PURCHASE</b> (New Official Station)		
Number of Dwelling Units on Property				
Sale and/or Purchase Price				
Date of Closing or Settlement				
Amount of Expense Being Claimed				
<b>EMPLOYEE CERTIFICATION OF RESIDENCE PROPERTY DATA</b> ▶	I hereby certify that the amount claimed in connection with the above sale represents only amounts actually paid by me and that title to the property was in my name and/or a member of my immediate family and was my residence when first definitely informed of my transfer.		I hereby certify that the amount claimed in connection with the above purchase represents only amounts actually paid by me and that title to the property is in my name and/or a member of my immediate family and is my new residence.	
	14. EMPLOYEE'S SIGNATURE	15. DATE	16. EMPLOYEE'S SIGNATURE	17. DATE

SECTION D - APPROVALS				
<b>EMPLOYEE CERTIFICATION OF RESIDENCE PROPERTY DATA</b> ▶	<b>SALE EXPENSES.</b> The expenses of the sale applied for above are hereby approved as being (1) reasonable in amount and (2) customarily paid by a seller in the locality where the property is located.		<b>PURCHASE EXPENSES.</b> The expenses of the purchase applied for above are hereby approved as being (1) reasonable in amount and (2) customarily paid by a buyer in the locality where the property is located.	
	<input type="checkbox"/> 18. As Claimed	<input type="checkbox"/> 19. As Reduced, Per Attached Memo	<input type="checkbox"/> 23. As Claimed	<input type="checkbox"/> 24. As Reduced, Per Attached Memo
	20. SIGNATURE		25. SIGNATURE	
	21. TITLE		26. TITLE	
	22. DATE		27. DATE	

SECTION E - FINAL ADMINISTRATIVE APPROVAL FOR PAYMENT		
29. AMOUNT	▶ Payment of this claim is approved in the amount indicated. If the amount approved is less than the amount claimed, see the attached memo.	
30. SIGNATURE	31. TITLE	32. DATE

## COST INCURRED AND PAID IN SELLING RESIDENCE AT OLD OFFICIAL STATION OR PURCHASING RESIDENCE AT NEW OFFICIAL STATION LOCATION (OR BOTH)

ITEM	EXPLANATION	FORMER RESIDENCE	NEW RESIDENCE
1.	LOAN AMOUNT.		
2.	BROKERAGE FEES.: The sales commission paid to a broker or real estate agent for selling former residence. Also, fees for listing a residence and payment for multiple listing service, if not included in commission paid to the broker or agent.	\$	
3.	ADVERTISING: Expenses paid for newspaper and other advertising when a direct sale is made without the services of a real estate broker or real estate agent.	\$	
4.	APPRAISAL FEE: The amount paid to a professional appraiser for establishing a suggested sale price for the residence.	\$	\$
5.	LOAN ORIGATION FEE: Amount charged to cover the administrative overhead cost of processing the loan. (Subject to limitations contained in FTR 2-6.2d(1)(b).).		\$
6.	SETTLEMENT FEE: Amount paid to escrow agent, title company, or similar entity for closing a real estate transaction.	\$	\$
7.	ATTORNEY FEE: Searching title, preparing abstract and legal fees for a title opinion (does not include costs of litigation).	\$	\$
8.	TITLE INSURANCE POLICY: Owners coverage only on sale where customarily furnished; Lenders coverage only on purchase when required by the lending institution.	\$	\$
9.	CERTIFICATIONS: The amount paid for any required certifications as to structural soundness or physical condition of property, when required by mortgagee-lender, FHA or VA (includes termite inspection fee).	\$	\$
10.	LOAN APPLICATION FEE: The amount paid.	\$	\$
11.	STATE REVENUE STAMPS: The amount paid.	\$	\$
12.	CREDIT REPORT: The amount paid for credit or factual data report on the buyer, if required by mortgagee/lender, FHA or VA.	\$	\$
13.	RECORDING FEES AND RECORDING TAXES: Other charges paid incident to recordation (e.g., mortgage discharge recording fees).	\$	\$
14.	PREPAYMENT CHARGE: The amount paid as required in the mortgage or other security instrument as a charge for prepayment; or if not specifically required by the mortgage instrument, the amount paid limited to 3 months prevailing interest on the loan balance.	\$	
15.	SURVEY:	\$	\$
16.	SALES OR TRANSFER TAXES; MORTGAGE TAX, IF ANY: The amount paid.	\$	\$
17.	OTHER INCIDENTAL EXPENSES: Such other reasonable and customary charges or fees paid as may be authorized and not properly includable in items listed above (itemize and explain; if necessary, attach separate sheet).		
		\$	\$
		\$	\$
		\$	\$
<b>TOTAL ►</b>		\$ 1) and 3)	\$ 2) and 3)

**Note:** In accordance with the real estate expense provision of the Federal Travel Regulation, costs of insurance against damage or loss of property, maintenance and operating costs and property taxes are not reimbursable. Also, mortgage discounts, points, interest on loans, and losses in connection with the sale or purchase of a residence due to price or market conditions are not reimbursable. Notwithstanding the above, no fee, cost, charge, or expense is reimbursable which is determined to be a part of the finance charge under the Truth in Lending Act, Title I, Public Law 90-321 and Regulation Z issued pursuant thereto by the Board of Governors of the Federal Reserve System.

**Footnotes:**

1. The aggregate amount of expenses which may be reimbursed is the amount which should not exceed 10% of sale price or the maximum allowances as stated in FTR 2-6.2g.
2. The aggregate amount of expenses which may be reimbursed is the amount which should not exceed 5% of purchase price or the maximum allowances as stated in FTR 2-6.2g.
3. If property is multiple family unit type (excluding condominium), expenses will be prorated and allowed for residence unit only.

**Privacy Act Notice.** The following information is provided to comply with the Privacy Act of 1974 (P.L. 93-579). The information requested on this form is required under the provisions of 5 USC, Chapter 57 (as amended) and Executive Orders 11609 of July 22, 1971, and 11012 of March 27, 1962, for the purpose of recording travel expenses incurred by the employee and to claim other entitlements and allowances as prescribed in the Federal Travel Regulation (41 CFR 101-7). The information contained in this form will be used by Federal Agency officers and employees who have a need for such information in the performance of their duties. Information will be transferred to appropriate Federal, State, local or foreign agencies, when relevant to civil, criminal, or regulatory investigations or prosecutions or pursuant to a requirement by GSA or such other agency in connection with the hiring or firing, or security clearance, or such other investigations of the performance of official duty in Government service. Failure to provide the information required will result in delay or suspension of the employee's claim for reimbursement.